

Balentine Names Liz Thomas Head of Marketing

As Balentine continues rapid growth, Liz will ensure the firm's core values stay at the forefront of communications, public relations, and online presence.

ATLANTA, GEORGIA, UNITED STATES, March 15, 2024 /EINPresswire.com/ -- Balentine, an independent wealth management firm based in the Southeast, recently announced the promotion of Liz Thomas, CFP® to Head of Marketing.

Since Liz joined Balentine in 2019, her efforts to chart the strategic direction of the firm's communications, public relations, and online presence have contributed to its rapid growth. As Head of Marketing, she will continue to illuminate the firm's areas of expertise, identifying how it can continue to serve its target audience and ensuring that information is communicated effectively.

CEO Adrian Cronje, Ph.D., CFA shared that Thomas's thoughtfulness and exceptional skill in working collaboratively – gaining input and feedback from clients, colleagues, and experts in brand strategy – netted an incredibly well-received rebrand and new website.



 **BALENTINE**

Liz Thomas, CFP® has been promoted to Head of Marketing.



BALENTINE

A WEALTH OF PERSPECTIVE

Balentine creates custom, holistic solutions for wealth creators at every stage of their journey.

“As Balentine continues to expand, we must protect our core values and keep innovating,” said Cronje. “With Liz’s expertise, dedication to collaboration, and focus on putting the firm first, our



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*Adrian Cronje, Ph.D., CFA, CEO
of Balentine*

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Thomas's impact on the firm goes deeper than Marketing. In the four years since joining Balentine, she has emerged as a sought-after thought partner and leader internally.

"Liz brings innovative ideas, a strategic focus, and a team-oriented approach to every conversation, and because our marketing team works with every department, her impact has been felt firm-wide," said Chief Operating Officer Jennifer Dangar. "I look forward to how she will continue to

push our firm forward in her new role."

Liz has worked in marketing strategy and implementation for nearly two decades. She honed her skills in marketing for financial services in positions at AIG SunAmerica, UBS Financial Services, and Nora Wealth. She also earned the CERTIFIED FINANCIAL PLANNER™ designation. Liz is a graduate of The University of North Carolina at Chapel Hill and she completed a Certificate in Digital Marketing from Yale School of Management in 2019. She has been a Vistage member since 2020.

"I admire the leaders of this firm and what they have built, the intentional culture, and the way they have redefined client relationships. While investing is at the foundation of what we do, helping families define their purpose and improve their resiliency for generations is the heart," said Thomas. "I'm honored to be entrusted with telling Balentine's story."

About Balentine

Balentine is a wealth management firm that aims to help entrepreneurs and their families ensure the wealth they've created will endure for generations. With wealth management, financial planning, business advisory, and legacy planning services, Balentine creates custom, holistic solutions for wealth creators at every stage of their journey. Today, Balentine offers its wealth of perspective to over 300 clients nationwide, advising on approximately \$7.5 billion of assets.

In almost four decades of serving clients, Balentine is consistently recognized as a top financial planning and advisory firm by Forbes, Barron's, The Financial Times, and InvestmentNews. An independent, employee-owned firm with offices in Atlanta and Raleigh, N.C., Balentine is also a perennial winner of the Pensions & Investments Best Places to Work in Money Management Award.

For more information, visit: <https://www.balentine.com/>

Balentine is an investment adviser registered with the U.S. Securities and Exchange Commission (SEC). Registration does not imply a certain level of skill or training. More information about Balentine's investment advisory services can be found in its Form ADV Part 2, which is available upon request.

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